CLL© Step-by-Step Guidance

Denise Berger, Ed.D.
Dawn Garrett, Ed.D.
March 2016 ed.

Step-by-Step Insight

There is a problem that needs to be solved or an opportunity that must be explored. It is recognized by more than one sector and there is agreement to meet and discuss. Each sector's stakeholders needs to identify their representative leader(s) who will be part of the project's process and lead the efforts of each sector to come together. Preliminary information to share as introductory material is agreed, such as background, experience, resources to bear, levels of authority, constraints, strengths. It is in this step that the group will also decide if a third party intermediary is desired to facilitate all group meetings and/or which representative is taking the lead in coordination and overall project management.

This is a time for meet-and-greet and a time for the representatives to get to know one another informally. Sharing of the preliminary information happens, as do social exercises to break down barriers and open up lines of communication. This discovery step also sparks dialogue about positive attributes, and an overview of what is working (Cooperrider & Whitney, 2005) and what the partnership wants to create in a macro sense (Block, 2011). Stratton-Berkessel (2010) highlights the discovery part as a process of honoring personal stories, respecting the individuals in the group, clarifying what the participants said, and finding common themes that will form the "positive core" ("Part III, Discovery Phase," para. 1).   Make no mistake about it. The social component in this step is critically important to setting up the project for success.

The end of this step culminates in a discussion outlining the social agreement – how dialogue will flow, expectations on responsibilities, process for conflict resolution, and communication styles, preferences, and requirements. Establishing the social norms early in the process will allow legal paperwork to be prepared and finalized quickly and efficiently so that the project does not get delayed or stuck. Financials also need to be discussed early in the process. Is there funding? How is funding secured? Are there any limitations to obtaining funding?

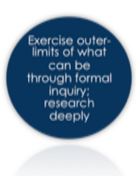
Adult learning is based on the assumption that adults are self-directed learners, and require the following components in any learning situation in order for the learning to be meaningful, impactful, and applied: to know why they need to learn something, to be viewed as independent, to draw upon their world experiences in the learning process, to have the learning's timing and readiness match with their social and developmental roles, for learning to be centered around performance, and to have their motivation fueled by internal needs. In essence, for adults, learning takes place from the inside out (Knowles et al., 2005).

Apply the five questions from Epstein & Yuthus' (2014) Social Impact Creation Cycle:

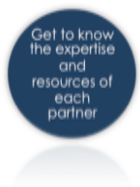
http://www.ssireview.org/articles/entry/measuring_and_improving_social_impacts_a_guide_for_nonprofits_companies_and

Figure 1: The Social Impact Creation Cycle.

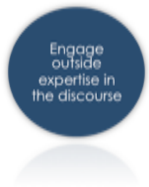
Additionally, early in the project life cycle, it is important to establish guidelines for healthy discourse. An exercise to determine how to build mutual respect between the parties is critical to setting in motion good communications, fostering an open forum to bring all voices to the table, and agreeing on how to disagree constructively within the group.



This step is all about uncovering what is possible for the future. Here the group envisions what the perfect state looks like for each party and collectively for the whole. This is a step wherein a facilitator will be beneficial to run the group through various activities that will fill up the "white board." Rules of engagement and discourse are also important here so that diverse perspectives and systems thinking surface to create a shared value approach, and creativity and critical thinking are nurtured in a respectful environment for all. Witness the problem first-hand, experience the issue, look for opportunities from within, challenge assumptions, and agree on research and reporting to be completed that will help everyone to understand the facts at hand, the limitations, and the areas of exploration in order to hone the outer-limits discussed. Deeply research the issue from unbiased angles. Open the possibilities with broader information.



It is critically important that there is a shared exercise that vets and articulates the strengths and limitations of each partner in order to harness the best that each can bring to the solution. This saves time and energy down the road and is about accepting, not rejecting, the partnership. Building on the strengths in terms of personalities, action-orientation, resources to bear, time commitments, etc… build success early. Also, begin thinking about the construction of a reciprocal relationship. You may have started this project with a linear agenda (in other words, if we do A,B,C we can get to X result). However, in getting to know the various partners, you may find opportunities to mutually help each other in your organizational development.



Bring in outside resources to fill in gaps of knowledge and/or augment critical areas for the strategic decision-making. Outside expertise can also be used as a sounding board at this point on the outer-limits information. During this step bringing in statisticians and system experts to help develop system's modeling techniques to simulate the affect of actions and outcomes will help the group to use facts and data to determine appropriate use of their collective resources to achieve desired outcomes.

Right about now, the group might be wondering about getting on with the actual task-at-hand. Perhaps a few weeks have passed, or a few months, since the representatives came together for the first time but these preliminary steps build the necessary foundation. At this point, all of the investigation and exploration work should be completed, and now the group focuses on constructing a vision statement, the project's mission, the values that they collectively represent, and a few key strategies/best practices that might drive the project.

The group has maintained an open mind and the experience focused on broadening knowledge and perspectives. This is the time to focus on a specific thematic goal that the group believes is realistic and achievable, even if complicated, sensitive, and/or longitudinal, and where each individual clearly understands their area(s) of contribution. The thematic goal is not a vision statement, or a tactical metric. It is a statement that lays out the top priority for the group to accomplish (Lencioni, 2008). This may be repetitive with the purpose statement, it might be more specific, or it may have morphed as a result of the research and development work by the team. It is important that it is a specific action statement that must support the project's vision, mission, values, and strategies. For example, in the arena of x,y,z subject/issue, the group will address the a,b,c part to produce meaningful results. It might be a good idea for the group to ask this question in order to frame measurement of targeted results.: "I know we have achieved our objective for this project when ....."   By asking this question, the group establishes the intent of what it seeks to attain (Tyler, 1949). At this point it will be important to prioritize and focus the many potential areas of opportunity into the critical targeted few.

At this point the group needs to make the thematic goal actionable by creating a few shared, qualitative objectives (Lencioni, 2008). This is important to ensure commitment of the parties and what areas will be measured. Is there sufficient sponsorship to ensure that critical resources of time, money, expertise, facilities etc are going to be available to achieve the desired outcomes? Lencioni (2008) cautions against quantification at this point because the intent is for the group to stay open to envisioning how objectives can be met. It is also important that the entire group owns all the objectives even if particular ones don't appear to fit into their area of influence or expertise. External perspectives are often some of the most important to creating new and innovative ways of looking at problems.

This is the part of the equation where the paperwork and bureaucracy are completed. Bring in the lawyers, but don't squash the deal. Ideally, many of these parameters have already been laid forth in the earlier parts of the cycle, and this is formality. Confidentiality is also critically important to understand both from an overall project perspective and also in terms of respecting individual partners' needs and restrictions.

Now it is time to quantify the measurement of goals and objectives. Having a method for capturing actual results helps the group understand the target and builds even greater clarity of the thematic goal. It is essential that the group align around how success will be measured. Well-intended effort do not necessarily equate to effective results. Less than 30% of well reasoned, technically sound change efforts actually succeed (From *Compact Risk Controlling the Perils of Change*, by Merry Lee Olson in Training + Development Magazine, September 2008). The group will need to establish the current state baseline from which improvements will be measured as well as the high-level improvement plan.

Especially for large-scale projects, the project team will need to assess what skills and resources are necessary to move forward, and commit to them. Often, this might mean engaging a full-time person to manage all the components, moving parts and communications of the project and its progress. More financial discussions will undoubtedly be part of the conversation.

This is the tactical part of what will need to be accomplished, the nuts and bolts of action-items, timeframes, agreed milestones, communication protocol for progress updates, and which representatives are best suited for each part. Enlisting an experienced project/program manager familiar with managing the systems and micro-projects will increase efficiency and accountability. During this step the improvement plan is translated into specific solution approaches, an implementation plan and associated measures.

Get ‘er done. Move to action.

This builds the necessary feedback loop and is critical to the CLL spiral of development. This needs to happen as a group and in a format wherein engaging and effective discourse are still honored. The most significant part of this step are the lessons, how the lessons inform next steps, how they provide take-aways for any next ventures, and how knowledge can be shared with others.

Success? A new venture? Lessons learned to improve the next CLL? Pass the knowledge on? Select the next thematic goal to continue spiraling improvements for large complex initiatives. Give it forward.